

PUBLIC INFORMATION & COMMUNICATION SERVICES (PICS)
NIH - TASK ORDER

RFTOP#75 TITLE: Privacy & Meeting Support - HIPAA

PART I – REQUEST FOR TASK ORDER (TO) PROPOSALS

A. POINT OF CONTACT NAME: Anthony Revenis

Proposal Address:
6011 Executive Blvd. Rm 529S
Rockville, MD 20892-7663

Billing Address:
Accounts Payable, OFM, NIH
Bldg 31, Room B1B39
Bethesda, MD 20892-2045

B. PROPOSED PERIOD OF PERFORMANCE: 2 years from award of the contract

C. PRICING METHOD: Time and material. This will be a draw-down task order, where an estimated amount will be obligated and specific jobs will later be authorized (in writing) by work orders. Firms should submit fixed hourly prices for the types of positions that are likely to be needed for this work and a method for pricing other positions (consider a formula based on the employee's compensation rate). Firms should also propose a handling charge for pass through costs. Separate rates may be proposed for sub-contracts and consultants.

You are instructed to submit a sample work order proposal for a medium meeting and also for a new two fold brochure.

D. PROPOSAL INSTRUCTIONS: Proposals should be submitted to the Point of Contact by e-mail. Please enter in the subject line the following text: "RFTOP #74 -- Proposal from [insert your firm name]." A signed task order form may be scanned and submitted or will be requested later from the successful bidder.

E. RESPONSE DUE DATE: Wednesday July 24, 2002 at 4:00 PM local time.

F. TASK DESCRIPTION:

Independently and not as an agent of the Government, the Contractor shall be required to furnish all the necessary services, qualified personnel, material, equipment, and facilities, not otherwise provided by the Government, as needed to perform the Statement of Work below:

When directed by a task order, the Contractor shall perform the following work. These tasks are not listed in a necessary order of expected sequence, intensity, duration or magnitude. All work under this contract shall be monitored and technically coordinated by the Project Officer or designee. Work performed on all tasks is subject to review and approval by the Project Officer or designee.

TASK TYPE 1 - LOGISTICAL SUPPORT FOR MEETINGS

The contractor shall provide technical and logistical conference management services for the participating Federal agencies and NIH Institutes, Centers, and Divisions (ICD). Depending on the size, location, and nature of each meeting, the types and amounts of services required are likely to vary. The offeror's facility should be within a reasonable driving distance to the National Institutes of Health (NIH) in Bethesda, Maryland, and should be of a size appropriate to mount the efforts implicit in the tasks specified. Among the main purposes of such meetings are: the planning of NIH education efforts, evaluating specific issues faced by researchers, and monitoring the an NIH education effort.

All work shall be monitored and technically coordinated by the Government Project Officer of each participating institute, center, and division. The Project Officer and the contractor shall meet periodically to review the status of activities and the work schedule.

The number, nature and size of these meetings may include focus groups involving 10 to 15 participants to small workshops or seminars involving up to 40 participants. Focus groups, workshops, and seminars are collectively referred to as "meetings" in the remainder of the document. These meetings may be scheduled for approximately the same times and are expected to be in the Washington metropolitan area. A contractor must be able to complete all tasks as specified in each task order. At the outset of each project or meeting, well before the proposed date(s) of the meeting, the Project Officer from the particular agency or ICD, other support staff and organizers will meet with contractor to discuss the design and requirements of each event. As determined by the Project Officer, there may be a wide range of specific support tasks. A detailed work plan draft will be developed by the contractor, identifying all required services and efforts to be employed.

The contractor shall set up internal systems to handle contract activities. These systems will guarantee that a working system is in place to run the contract smoothly and include: monitoring procedures, administrative files, reimbursement forms and procedures, and task order files. An administrative filing system shall be set up for contract information. This system shall separate administrative and logistical information, background materials research and report data, and financial reports. The contractors filing system will allow for quick retrieval of information to expedite monitoring and reporting activities and responses to questions by NIH staff. The contractor shall monitor the performance and completion of all work to make sure that it meets the firm's high standards and is completed on schedule and within budget. Accomplishments shall be monitored against the management and task order work plans. Periodic status reports stating the tasks that have been completed, those remaining, the timeframe for completion, problems encountered and how they were or will be resolved shall be given to the Project Officer at times as specified in the detailed work plans.

Many task order activities may be conducted concurrently and have competing and often near-term deadlines. A contractor must be able to respond to and satisfy such requirements, and draw up a comprehensive task list and schedule within one week of receiving the task order (or within

other reasonable time frames as stated in the Government's draft task list). The following represents a fairly comprehensive list of possible requirements:

1. Make arrangements for an appropriate meeting facility or mechanism (e.g. teleconferencing). Those to be held on the NIH campus or through NIH teleconferencing services may be booked by the Project Officer. However, the contractor is expected to become familiar with NIH conference sites, their servicing office, and other services for coordinating teleconferencing. The ability to make arrangements for all off-campus meetings, meals, breaks, and accommodations, whether to be held in the metropolitan Washington, D.C. area or elsewhere in the U.S., should be addressed in a response to this RFTOP. Hotel rooms and meeting facilities must comply with the Federal standards for accommodating handicapped participants. In consultation with the Project Officer or his designee, the contractor shall plan and manage coffee breaks and luncheons to be held in connection with any of the conferences. Coffee breaks shall be paid for by contract funds. Luncheons and other meals will be paid for by the participants.
2. Prepare and distribute letters of invitation and any informational attachments, such as agenda and registration materials. Research, as requested, proper titles, affiliations, and addresses. (No substitutions of participants shall be made without the prior approval of the Project Officer.)
3. Handle any pre-registration requirements, including receiving inquiries, disseminating information packets, and accepting registration fees.
4. Arrange lodging/accommodations and transportation for participants and speakers, including ground transportation between transport terminals and conference sites. All transportation services and travel allowances shall be made in compliance with Government standards and travel regulations. Hotel accommodations should be moderate to above average so that participants are comfortably accommodated within per diem lodging allowances if at all possible. Invoices for various expenses, per diem, travel, etc., are to be reviewed and approved by the Project Officer to have accurate record of contract costs.
5. Provide to those individuals identified by the Project Officer honoraria and/or reimbursement for all travel and per diem expenses allowed by the Government travel regulations, including economy airfare, train fare, or the Government's cents per mile rate of traveling by automobile.
6. Prepare, reproduce, and distribute to attendees by mail prior to the meeting date, and/or at the meeting, all necessary advance materials, including itineraries, appropriate travel guide materials, visual aids, background materials, and reprints, abstracts, etc. The contractor must be able to maintain computerized mailing lists that are in or are downloadable to Microsoft Excel.
7. Prepare progress reports to the Project Officers, and reproduce conference materials.
8. Reproduction, postage, and distribution logs shall be kept, enabling the Project Officers to have an accurate record of contract costs.
9. Provide a conference facilitator to assist the Project Officer during the meeting and sufficient staff for conference functions such as clerical support, messenger service, registration, information desk, audio-visual projection, recording transcription, and other conference support as needed.
10. Provide necessary voice amplification systems, blackboards and chalk, pointers,

projectors, screens, easels and boards for posters, and recording equipment, and meeting supplies, such as nametags, signage, nameplates, and other identifiers, note pads and pencils, water pitchers and cups, etc. Written instructions on the proper operation of audio-visual equipment must be provided. Conference facilities must have accommodations for participants with hearing or visual disabilities.

11. Record, transcribe, and edit proceedings of meetings, and workshops, as required, within one week of the meeting, or another previously agreed upon time frame. Or, at the option of the Government, prepare, edit, and reproduce minutes of meetings, as required, within one week of the meeting or another previously agreed upon time frame.
12. Prepare, reproduce, and distribute post-conference materials to participants, as required.
13. Prepare periodic financial reports to show expenditures and balance of funds. Any items over or under budget shall be discussed with the Project Officers. Prepare and submit to the Project Officers, within 10 working days following the conclusion of each meeting, a report listing: meeting title, dates, place, a brief description of the substance of the meeting, a copy of the program, and a list of speakers and registered participants. Accompanying this should be a detailed description of all services provided and problems experienced.
14. The projected “mix” of meetings for each contract year is as shown below:

	<u>Medium</u>	<u>Small</u>	<u>Teleconf</u>	<u>Total</u>
Year 1	1	5	10	16
Year2	1	5	10	16

TASK TYPE 2- WRITING AND PRODUCTION OF DOCUMENTS

General types of contractual support will be required for activities that include, but are not limited to, the following:

1. Assist in the research, writing, and editing of technical assistance material (e.g., brochures, pamphlets, white papers, and others) for distribution to a scientific audience but on subject matter that requires communication in plain language. Specifically, the subject matter will pertain to the Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule. In most cases, the Project Officer will provide the Contractor with content to be included in technical assistance material.
2. After receiving the content from the Project Officer, the Contractor will be required to develop and finalize these materials for printing on generally near-term deadlines (within one week after receiving materials) for proofing by the Project Officer. The development of technical assistance material will involve research, writing, editing, creating graphics and graphical representations of charts, tables, etc., typesetting, printing, and distribution.
3. Prepare minutes, summaries, transcriptions. Some of these may involve collecting, editing, and adding narrative to documents.
4. Write, edit and proofread documents including minutes of meetings from stenotyped material, tapes, notes, summaries of meetings, summaries and/or analyses of reports, correspondence, sections of reports, and complete reports, and mailing labels.
5. Produce documents, as appropriate, on the latest version of Microsoft Word and Corel

Word Perfect. (The contractor must update the computer system when new versions or updates of Microsoft Word and Corel Word Perfect occur or within three months of availability of revisions.) Copies of documents must be available on both 3.5" and 5.25" diskettes.

6. Have the capability of converting technical assistance materials and other documents into PDF files.
7. Participate in meetings at NIH and other parts of the Federal Government and biomedical/communications communities; serve on work groups at the NIH as appropriate.

TASK TYPE 3- DISTRIBUTION OF MATERIALS

General types of contractual support will be required for activities that include, but are not limited to, the following:

1. Store selected publications to fill requests.
2. Buy and store adequate supplies of envelopes and boxes to fill requests.
3. Prepare documents including materials produced in Task Type 2 for mailing. Use bulk or piece mailing and send in a manner that would incur the lowest cost. Use Government equipment at the contractor's locations or equipment furnished by the contractor. Use Federal permits or contractor permits as required by NIH. Speak with postal service account representative as required and use appropriate mailing methods as required by volume, frequency, weights, mailing lists, mailing keys, and bar codes. The mailings are to be done within the time frames specified by the Project Officer, typically within 5 working days of the contractors receiving the request.
4. Notify Project Officers when publication supplies are running low.
5. Provide a weekly messenger service to pick up publication requests and publication supplies, as needed, from Project Officers.
6. Fill requests for single and multiple copies of publications. When applicable, the contractor shall include a form letter to the requestor. The form letter may indicate the maximum number of publications available. Such form letters will be provided by the ICD.
7. If the requestor wants unusual items in addition to those publications normally stored and distributed by the contractor, the agency or ICD will attach these unusual items before sending the request to the contractor. The contractor will then complete the assembly of the materials to be distributed and finish the mailing process.
8. Track, and provide to the Project Officer upon request, a computerized spreadsheet (Microsoft Excel) that captures the date of the request, date of distribution, name of the requestor, mailing address, contact information, and number of items requested.
9. Provide periodic reports regarding the number of requests answered, postage costs, and the number of mailings that were returned because of incorrect addresses, etc.

10. Return all completed requests for 50 or more copies of a publication to the Project Officer, with the date on which the request was filled and the initials of the person who filled the request noted on the request.
11. Document internal procedures and processes for distributing materials under this task order.

TASK 4. WEB SITE PUBLISHING

The Contractor shall support all aspects of the management and development of a Web site for the HIPAA Privacy Rule. Specifically, the work to be performed includes, but is not limited to:

1. Content Development and Management
 - Receive, solicit, analyze, write, edit, clear, and post material on the site.
 - Interact with technical, scientific, communications, and managerial staff at NIH to facilitate involvement and enthusiasm of all parties who are or will be involved in content development.
 - Work with NIH staff to solicit and, when appropriate, implement their ideas regarding additions to and augmentation of Web site content and tools.
 - Maintain the site's currency with respect to activities specified by the Project Officer.
 - Organize and present the content in effective and aesthetically pleasing ways.
 - Work with HTML coding contractors and NIH staff to ensure that content is up-to-date and accurate and that all links on the Web site are functional and appropriate.
 - Evaluate and, if appropriate, select content management software; prepare justifications/purchase requests necessary to acquire and license the selected and approved software; and implement the transition to such software.
2. Web Site Management
 - Develop an organization/development plan for the Web site, present this plan to the Project Officer and other NIH staff, as appropriate, for consideration and approval, and implement the plan. This Web site will most likely be housed on an NIH server.
 - Ensure that all content and graphics on the Web site are compliant with all Federal and applicable standards, including adherence to the accessibility requirements of Section 508 of the Rehabilitation Act.
 - Work with designers, graphic artists, and technical personnel from NIH, CIT, and other organizations as necessary to redesign, develop, and enhance the Web site.
 - Develop and implement a plan for regular, ongoing usability testing to produce a Web site that is easy and satisfying to use.
 - Keep abreast of Web technical developments through research, attendance at conferences and seminars, and other avenues to ensure that the best, most current technologies and practices are implemented, as appropriate, on the Web site.
 - Document internal procedures and processes for website development,

maintenance, and management under this task order.

3. Marketing and Promotion of the Web Site

- Develop and implement a plan to market and promote awareness and use of the Web site.
- Analyze server logs and other information to determine patterns of use and other trends on the NIH Web site, make recommendations to the Project Office for changes to the site in response to these patterns and trends, and implement those proposed changes that are approved.
- Participate in meetings at NIH and other parts of the Federal Government and biomedical/communications communities; serve on work groups at the NIH as appropriate.

Special Requirements

The contractor and the Web site manager must have extensive experience in Web site design, organization, and management. The contractor and Web site manager must also have knowledge of writing for the Web, of biomedical science fields and terminology, and how to translate legally written language into plain language descriptions for scientific community.

NIH reserves the right to interview and approve or disapprove the proposed Web site manager. In addition, the Web site manager, if subject to removal by the contractor to meet the demands of other contracts and/or activities, must have a trained backup to make revisions in the absence of the Web site manager.

Reporting Requirements

In addition to those reports required by the other terms and conditions of the contract, the Contractor shall prepare (typewritten) the following reports to be submitted to the Project Officer in accordance with the delivery schedule, with a copy to the Contracting Officer

1. Technical Reports

- a. Monthly Status Reports - Two copies of a brief monthly status report for each task due 10 calendar days after the end of each month. These reports shall include:
 1. A quantitative and qualitative description of overall progress.
 2. Information on each individual task order including a list of all active task orders, activities, sub-tasks, status, next steps, individuals responsible for sub-tasks, deadlines, anticipated problems and related information.
- b. Debriefing Report: Two copies due upon completion of each task.
- c. Semi-Annual Reports - Two copies due one month following the end of each six-month time period. These reports shall include:
 1. A summary of the work performed during the previous six months.

2. Recommendations and conclusions based on the experience and results obtained.
 - d. Draft Final Report - Two copies due one month prior to contract expiration.
 - e. Final Report: Two copies due upon contract expiration. A draft of the final report shall be submitted 30 days before submission of the final document for Project Officers review and approval. This report shall include:
 1. A summary of all work performed.
 2. Recommendations and conclusions based on the experience and results obtained.
 - f. Data files disks, tapes, artwork etc - The Contractor shall deliver at the end of the contract all data files, original artwork, disks, tapes and other material produced as part of this contract.
2. Monthly Budget and Labor Summaries - Two copies of this report shall be submitted no later than 30 calendar days following the end of each month. The last report shall be submitted on the last contract-day. This report shall contain the following information:
- a. A listing of work orders issued to date. This listing shall provide the following information for each work order:
 1. Task order number and the most recent modification number (if any).
 2. Status (active, complete, or closed).
 3. Total direct labor hours authorized, total direct labor hours expended, and total direct labor hours not expended.
 4. Total estimated cost authorized or, if available, total costs expended.
 5. Current period expenditures of hours and costs.
 - b. A projection of labor hours expended as of the expiration date of the contract. This projection shall be extrapolated from the sum of labor hours actually expended for closed or completed task orders plus labor hours authorized for active task orders as of the last day of the period covered. A constant rate of authorization and expenditure shall be assumed for this extrapolation. Costs expended at completion shall be projected on the same basis as described for labor hours above.

WORK ORDER ASSIGNMENT

The assignment of individual tasks shall be initiated by the Project Officers. The Contracting Officer need be involved only if the task order total or scope of work is being changed. Each work assignment to be performed within the scope of this contract will be authorized in advance by a written work order. The Contractor shall not proceed with any task assignment until the work order is received (fax and e-mail is acceptable). The written work order shall contain the following data:

- reference to the contract number

- task order number
- work order number
- description of the task assignment
- Government estimate of number of labor hours required
- required deliverables

In providing support under this contract, the contractor shall initiate work only when so directed by a work order. Costs incurred for work under-taken that was not so directed by a task order shall be considered unallowable under this contract. The Project Officer is authorized to initiate task orders and to sign task orders indicating completion of activities.

1. For each task, the Project Officer will issue a work order request, specifying work to be done, required deliverables and schedule requirements.
2. The Contractor shall submit an estimate of the level of effort and estimated cost to perform the task within five (5) days after receipt.
3. Upon receipt and acceptance of the Contractor's initial work order estimates, the Project Officer will sign the work order to indicate approval and forward it to the Contractor. The Contracting Officer will review the proposed task order and, if approved, sign to indicate approval and forward an executed copy to the Contractor. If not approved, the Contracting Officer will notify the Project Officer of deficiencies found in the proposed task order.
4. After receipt of the approved work order, the Contractor shall begin work.
5. After award of the task order, the contractor will coordinate necessary billing issues with the Project Officer, who will be responsible for verifying that work is satisfactory and approving payments.

SECTION G EVALUATION FACTORS

Responses to this RFTOP will be evaluated based on the following elements:

1. Price or cost.
2. Past performance, including demonstrated ability to respond to urgent requests with rapid turn-around times and sample materials.
3. Responses to the specifications in the SOW.
4. Demonstrated ability to work well with multiple Federal agencies.

Task Order# NICS-75

TITLE: Privacy & Meeting Support - HIPAA

PART II - CONTRACTOR'S REPLY: CONTRACT #263-01-D-0_____

Contractor:

Points of Contact:

Phone-

Fax-

Address:

TOTAL ESTIMATED COST:

Pricing Method: T&M

TOTAL ESTIMATED NUMBER OF HOURS:

PROPOSED COMPLETION DATE:

FOR THE CONTRACTOR: _____

Signature

Date

SOURCE SELECTION:

WE HAVE REVIEWED ALL SUBMITTED PROPOSALS HAVE DETERMINED THIS FIRM SUBMITTED THE BEST OVERALL PROPOSAL AND THE PRICE/COST IS REASONABLE.

Billing Reference # _____

Appropriations Data: _____

RECOMMENDED:

FAX #

Signature - Project Officer

Date

APPROVED: _____

FAX #

Signature - Contracting Officer

Date

NIH APPROVAL -

CONTRACTOR SHALL NOT EXCEED THE ESTIMATED LABOR HOURS OR ESTIMATED TASK ORDER AMOUNT WITHOUT THE WRITTEN APPROVAL OF THE CONTRACTING OFFICER & PICS COORDINATOR

APPROVED: _____

Signature –Anthony M. Revenis, J.D., NIH-PICS Coordinator

Date